



WORKFORCE PLANNING AND DEVELOPMENT

CONTINUITY OF OPERATIONS • RECRUITMENT • ENGAGEMENT • RETENTION • DEVELOPMENT

AGENCY PROFILE



INSTRUCTIONAL GUIDE

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1.0 Workforce Planning Background

In 2017, the Virginia General Assembly created a legislative mandate ([§ 2.2-1209. Agency director human resource training and agency succession planning](#)) which requires the director of each agency in the executive branch of state government include in the agency's annual strategic plan its key workforce planning issues. DHRM's charge is to establish guidelines for the content of such workforce and succession plans.

Since then, DHRM has provided various tools and an Excel based Workforce Planning and Development report template to guide agencies on what workforce planning information to evaluate and include.

In 2022, DHRM has focused on realigning the strategy to workforce planning that incorporates a more holistic approach and focuses on the areas of continuity of operations, recruitment, retention/engagement, and workforce development. DHRM is developing tools and templates using a modular design approach, which enables DHRM to build a suite of integrated and customizable workforce planning tools for agencies.

2.0 Agency Profile Template

As part of the modular design approach, DHRM has created an Agency Profile Template, which is the starting point for the workforce planning process. This template collects general agency and workforce information that is used in conjunction with other tools and can be directly imported into other tools without having to re-enter data.

The Agency Profile allows the agency to customize elements of their workforce planning strategy and outlines how Agencies can go beyond a foundational level of workforce planning, to an in-depth and even comprehensive level of workforce planning.

Though it is based in Microsoft Excel, it is not designed as a traditional workbook or worksheet. The template is organized by grouping key information on various tabs, indicated at the bottom of the template, which builds upon previous tabs.

- **Home** - The Home tab is a central place for users to navigate to the different tabs, track their progress of each step, and to see what version of the template is being used.
- **Getting Started** – The Getting Started tab reviews important features, setup, and instructions for using this template to its full potential. *It is highly encouraged for users to review this tab.*
- **Customizations** – The Customizations tab identifies aspects of the workforce planning tools and templates that can be customized to the specific agency, such as employee classifications and executive team positions.
- **Agency Details** – The Agency Details tab identifies general agency information, such as name, secretariat, number, total positions (overall, leaders, and executives), and strategic plan information. Though some data elements are optional, they may be required to utilize other tools or templates.
- **Agency Workforce** – The Agency Workforce tab identifies the workforce demographic information for employees, leaders, and executives at the agency.
- **Profile Summary** – The Profile Summary Tab provides a brief workforce insights summary of the agency profile, with filters between fiscal years and employee demographics (non-leader, leader, or executives). The workforce insights summary can also be exported as a standalone PDF if desired.

The template also uses a series of Excel Macros, specific procedures that can automate processes, to increase the template's functionality and ease of use. Macros must be enabled in order to use these functions. However, the template is also designed so that it can be used without Marcos if an agency wishes, but would requires some manually steps when completing specific sections. More information on the design on the template are reviewed in the “Getting Started Tab” section.

3.0 Workforce Planning Data Definitions

The Agency Profile begins the Workforce Planning and Development process at the Agency. To promote alignment, definitions for specific data metrics are outlined in the [Workforce Planning Data Definitions document](#) on the DHRM Website.


The Agency Profile includes data elements defined in both the General Definitions and Agency Profile Template sections of the data definitions document.

Please review the data definitions document for specific definitions as needed.

4.0 Tab Guides

The Agency Profile template is divided into several tabs that house similar information. It is recommended for users to progress through the tabs from left to right, beginning with the Home Tab.

Home Tab

The Home tab is a central place for users to see a description of and navigate to the different tabs, track their progress of each step, and to see what version of the template is being used. The version number is located in the bottom right corner of the home tab, and is represented by the  icon.

Each of the tab names, highlighted in blue, are hyperlinks to the tabs. Click on any of the names to navigate to the respective tab.

To begin using the template, click on the “Getting Started” Tab name in blue.



Getting Started Tab

The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Agency Profile Plan template. Though it is not required to review, **it is highly recommended users spend time to review this information.**

The tab begins with a quick overview and description of the contents.

Step 1: Review Overall Setup

The Getting Started tab provides a breakdown of the overall setup for the remaining tabs. Each tab follows the general setup of having the step number and title on the left hand side, a set of instructions underneath, and the required data to be entered labeled (either above or to the left).

Cells with a yellow background indicate required information to be entered and cells with a green background are optional. Once all the required information is entered, the step indicator will change from **Incomplete** to **Complete**.

Click to view help
(NOTE: cannot edit file while help is open)

Step Number and Title

Complete / Incomplete Indicator for Step

Step 3: Enter Agency Size & Structure Information **Complete**

INSTRUCTIONS: Please enter the maximum employment level and position information for the agency. If the agency wishes to utilize the Sub-Agency or Internal Department review tool (a version of the Agency Profile and Agency Strategy templates), please identify the internal departments and/or sub-agencies. See the instructions for each sub-step for specifics of how to complete each step.

Instructions on how to complete the step

Sub-Step Number and Title

Step 3(a): Enter Maximum Employment Level (MEL) **Incomplete**

INSTRUCTIONS: Enter the maximum employment level (MEL) for the agency in the yellow boxes below for each respective fiscal year. The maximum employment level is the authorized number of salaried full-time equivalent employees at the agency from the Appropriations Act.

Description of what data to enter in the cell

Maximum Employment Level (MEL)

FY21 FY22

Description of what data to enter in the cell


Cell to enter data (click on cell to enter data)






NOTE: Calculations & Formulas for Data Metrics are in the Help Window




Some steps may include sub steps, indicated by the step number and letters slightly indented from the left.

Step 2: Review Important Features of This Tool

The Getting Started tab provides a breakdown of the important features of the template, used to assist with entering and interpreting workforce information. Below are descriptions of the template's key features.

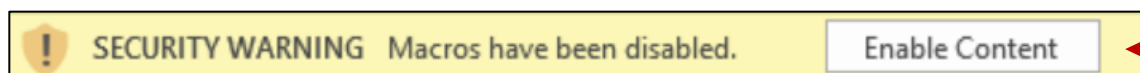
	<h3>USE OF EXCEL MACROS</h3> <p>This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. NOTE: Excel Macros must be enable to use them. The template can also be used without the Macros, but will require some manual edits.</p>
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	<p style="text-align: center;">EASY FILE NAVIGATION</p> <p>Each Excel Worksheet, or tab, houses related information which is compiled together into a single report. Links to each tab are frozen at the top of each tab to easily navigate between them.</p>
	<p style="text-align: center;">COLOR CODED DATA ENTRY</p> <p>Colors are used to identify what data should be entered and where. Yellow indicates required information. Green indicates optional information, and Gray indicates information is not required.</p>
	<p style="text-align: center;">BUILT-IN HELP FEATURES</p> <p>This template has a built in help feature. Click on the question mark in the blue circle to open a window with additional information, definitions, and steps to complete. NOTE: Macros must be enabled. The template cannot be edited while help windows are open.</p>
<p style="text-align: center;">COMPLETE INCOMPLETE</p>	<p style="text-align: center;">PROGRESS INDICATORS</p> <p>The home tab provides progress indicators for each step of the template. Each tab also provides progress indicators for each step or sub-step, which show if the step is complete or incomplete.</p>
	<p style="text-align: center;">DATA IMPORT</p> <p>This template is part of a suite of integrated workforce planning and development tools. Using these tools allows for information to easily be imported from one tool to the next. Data cannot be imported unless using a specific template, provided by DHRM upon request. NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</p>
	<p style="text-align: center;">TEMPLATE VERSIONS</p> <p>As we continue to enhance this template, integrate it with other elements of workforce planning and development, or as changes to any mandates or guidance occurs, new versions of this template may be released. The version number is located on the Home tab in the bottom right corner.</p> <p>It is important to be using the most up to date version, which will be noted on the DHRM Workforce Planning Website. As new versions are released, the prior version data can be imported so no progress is lost.</p>

<p>FOUNDATIONAL</p>  <p>IN-DEPTH</p>  <p>COMPREHENSIVE</p> 	<p style="text-align: center;">INCREASING LEVELS OF ANALYSIS</p> <p>To better assist with navigating the landscape of workforce planning and development, the suite of integrated tools and templates provide indicators for three levels of analysis: foundational, in-depth, and comprehensive. These levels are used to better identify why information is collected and how it can be used throughout the tools and templates.</p> <p>All foundational level elements are required and both the in-depth and comprehensive elements are highly encouraged, but optional.</p>
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(Optional) Step 3: Enable Macros to Utilize Full Functionality

To ensure Macros are enabled, when first opening the file or anytime the filename changes, you will see a “Security Warning” at the top (shown in the picture below) indicating Macros have been disabled. Click the “Enable Content” button to enable macros for the file.



Click to Enable Macros

(Optional) Step 4: Import Data from Other Sources

For efficiency and integration to other workforce planning and development tools, data from other sources can be imported. Imported data, shown in the table below, will automatically enter the information into the respective cells. Agencies are encouraged to still review the information for accuracy.

Data Source	Data Imported
Agency Profile (Prior Version)	All Previously Entered Data
DHRM SecurePass Report Cardinal Report Blank Template	Total Positions by EEO Code/Classification* Leader Positions by EEO Code/Classification* Executive Positions by EEO Code/Classification* Employee Demographics (<i>Gender, Race, EEO Code, Classification, Disability & Veteran Status</i>)* Leader Demographics (<i>Gender, Race, EEO Code, Classification, Disability & Veteran Status</i>)* Executive Demographics (<i>Gender, Race, EEO Code, Classification, Disability & Veteran Status</i>)* <div style="text-align: right;">*Calculated Data</div>
PeopleAdmin RMS Report	Total Positions by EEO Code/Classification* (only vacant positions) Leader Positions by EEO Code/Classification* (only vacant positions) Executive Positions by EEO Code/Classification* (only vacant positions)

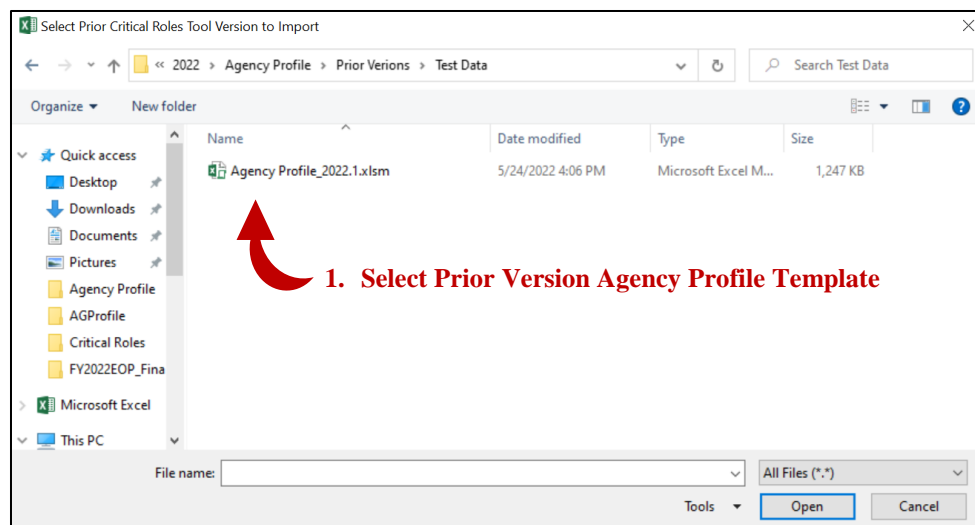
	<i>*Calculated Data</i>
FY 2022 Employment Opportunities Plan	Strategic Plan Objectives and Action Items
FY 2021 Workforce Planning and Development Template	Total Positions by EEO Code* Employee Demographics (Gender & Race)* Leader Demographics (Gender & Race)* Executive Demographics (Gender & Race)*
NOTE: Some data from this template may not match current definitions, specifically metrics by classification and executive team. Agencies should review any calculated FY21 values to ensure they match FY22 definitions.	<i>*Calculated Values</i>

The example below is how to import data from a prior Agency Profile template, however, the process is the same for all data import options.


To import the data, click on the Import Data Icon  for the tool the data is imported from (such as a previous version of the Agency Profile).



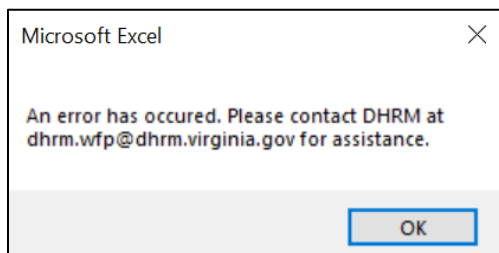
This will open the standard “Open File” dialog box. Simply locate and select the previous version Agency Profile template and click “Open”. (Shown in the picture below).



If the data is imported successfully, the template will indicate the date and time the data was imported (shown in the picture below).

<i>Last Uploaded Date and Time</i> 4/12/2022 14:55	<i>Upload Status</i> Upload Complete 
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If the data import was unsuccessful, the dialog box (in the picture below) will indicate an error occurred and to contact DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov.



The same process is used to import data from the other sources (SecurePass, Cardinal, Blank Template, RMS, Employment Opportunities Plan, and FY21 Workforce Planning and Development Template). Before importing these sources, the Customization Tab must be completed first (to ensure proper calculations of employee classification and executive team metrics). An indicator on the Getting Started Tab indicates if these are completed (shown below).

Customization Tab Not Completed:

Please Complete the Customizations Tab before Importing Data from Other Sources

Customization Tab Completed and Data can be imported:

Data from Other Sources can now be imported

See Appendix A for Information of Running Specific SecurePass, Cardinal and RMS Reports

Customizations Tab

The Customizations tab allows the Agency to customize the employee classifications, the positions identified as part of the executive team, and optional retirement parameters or transaction code map to be used in workforce planning and development templates and tools.

After creating these lists, the agency is then able to import workforce data from other sources on the Getting Started Tab to automatically calculate information on the agency details and agency workforce tabs.

Step 1: Identify if the Agency is currently using the Cardinal HCM System

To complete step 1, indicate if the agency is currently using the Cardinal Human Capital Management System by selecting either “Yes” or “No” from the dropdown menu in the yellow box (shown in the picture below). To show the dropdown arrow, click in the yellow cell.

Repeat this same process for the second question, indicating if the Agency utilizes their own HRIS (not PMIS or Cardinal) systems.

FOUNDATIONAL

Step 1: Identify if the Agency is Currently using the Cardinal HCM System Complete

INSTRUCTIONS: Please select either "Yes" or "No" from the dropdown menu for the questions if the agency is currently using the Cardinal HCM system and whether the agency utilizes its own HRIS system (not PMIS or Cardinal). This will adjust the data import process to match the correct fields and update terminology in other tools or templates this Agency Profile is imported to.

Is the Agency current using the Cardinal Human Capital Management System? No

Does the Agency utilize its own HRIS (Not PMIS or Cardinal)? No

Click for Help if needed

1. Click on Arrow to See Dropdown.

2. Select "Yes" or "No" From Dropdown.

Step 2: Identify Employee Classifications

To complete step 2, enter the title and a brief description of employee classification the agency uses (such as Classified, Wage, Agency Head, Other Non-Classified, etc.) by clicking the blue "Add Employee Classification" button to show the entry boxes (shown in the picture below). Up to 15 employee classifications can be added.

To calculate metrics correctly, the classification title should be exactly the same as those in any imported reports. Repeat this process for each additional classification to be added. **If Not Using the Excel Macros, Skip to Step 2(a)**

FOUNDATIONAL

Step 2: Identify Employee Classifications Complete

INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.

1. Click the "Add Employee Classification" button again to add up to 15 Classifications

2. Enter the Classification Title in the Yellow Box

3. Enter a brief description of the Classification

Classification Title	Description (Very Brief)
Classified	State Employee

Classifications can be removed by clicking the blue "Remove Last Classification" button. This will remove the last employee classification was added.

FOUNDATIONAL

Step 2: Identify Employee Classifications Complete

INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.

Add Employee Classification Remove Last Classification

Classification Title	Description (Very Brief)
Classified	State Employee

Click to Remove Last Added Classification

(Optional) Step 2(a): Enter Employee Classifications without Macros

If the blue buttons were used to enter the Employee Classifications, this step can be skipped.

In the event Macros are not being used, the Employee Classifications can be entered by first entering the total number of classifications in the green box.

(Optional) Step 2(a): Enter Employee Classifications if Not Using Macros

If chosen not to use Macros, please enter the total number of employee classifications below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the employee classification information in the cells above.

Total Number of Employee Classifications

1. Enter the Total Number of Employee Classifications

After the number is entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

TO HOME TAB TO GETTING STARTED CUSTOMIZATIONS TO AGENCY DETAILS TO AGENCY WORKFORCE TO PROFILE SUMMARY

FOUNDATIONAL

Step 2: Identify Employee Classifications Complete

INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.

Add Employee Classification Remove Last Classification

Classification Title	Description (Very Brief)
Classified	State Employee

(Optional) Step 2(a): Enter Employee Classifications if Not Using Macros

If chosen not to use Macros, please enter the total number of employee classifications below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the employee classification information in the cells above.

Total Number of Employee Classifications 3

2. Click the filter Icon to show filter menu

Sort Smallest to Largest
Sort Largest to Smallest
Sort by Color
Clear Filter From "1"
Filter by Color
Number Filters
Search
Select All
OK Cancel

3. Verify "0" is unchecked

4. Click Ok

Scroll up on the sheet to see the entry boxes for the number of employee classifications. The number of Employee Classifications can be changed using this same process.

Step 3: Identify Agency Executive Team

To complete step 3, first enter a brief description of the Agency Executive Team or the process used to identify Executive Team positions in the yellow box (shown in the picture below).

FOUNDATIONAL

Step 3: Identify Agency Executive Team Complete

INSTRUCTIONS: Please enter a brief description on how the agency identifies the Executive Team. After, please identify the specific positions considered to be a part of the executive team by clicking the "add position" button. Please enter the position number, working title, the degree of separation (position levels) from the agency head and if they are in an appointed position or not. Up to 40 positions can be added.

Executive Team Description and/or Process of How Executive Positions were identified.

1. Enter Executive Team Description

Next, enter the position number, working title, degree from the Agency Head (number of leadership levels at the Agency), and if the position is an appointed position for any positions the Agency identifies as part of their executive team by clicking the blue "Add Executive Position" button to show the entry boxes (shown in the picture below). Up to 40 executive positions can be added.

To calculate metrics correctly, the position number should be exactly the same as those in any imported reports. Repeat this process for each additional position the Agency wants to identify as part of their executive team. **If Not Using the Excel Macros, Skip to Step 3(a)**

1. Click the "Add Executive Position" button again to add up to 40 Positions.

2. Enter the Position Number

3. Enter the Working Title

4. Enter the Degree from the Agency Head

5. Select "Yes" or "No" if the position is appointed or not.

Click to Remove Last Executive Position Added

Position Number	Working Title	Degree from Agency Head	Appointed?
12345	Agency Head	0	Yes

(Optional) Step 3(a): Enter Executive Team without Macros

If the blue buttons were used to enter the Executive Team, this step can be skipped.

In the event Macros are not being used, the executive team positions can be entered by first entering the total number of positions in the green box.

(Optional) Step 3(a): Enter Executive Positions if Not Using Macros

If chosen not to use Macros, please enter the total number of executive positions below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the executive positions information in the cells above.

Total Number of Executive Positions

1. Enter the Total Number of Executive Positions

After the number is entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

Position Number	Working Title	Degree from Agency Head	Appointed?
12345	Agency Head	0	Yes

2. Click the filter Icon to show filter menu

3. Verify "0" is unchecked

4. Click Ok

(Optional) Step 4: Identify Additional Parameters to Determine Retirement Eligibility

By default, retirement eligibility is calculated as individuals who are at least 65 years of age with at least 5 years of service. **If only using the default parameter, this step can be skipped.**

However, agencies are able to add additional parameters to expand the scope of retirement eligibility (based on age and years of service). Up to 5 additional parameters can be added.

To complete step 4, enter minimum age, minimum years of service, indicate if they must be met (and/or/end) with the sum of the age and years of service of the employee by clicking the blue “Add Custom Parameter” button to show the entry boxes (shown in the picture below). Up to 5 custom parameters can be added.

Repeat this process for each additional classification to be added. **If Not Using the Excel Macros, Skip to Step 4(a)**

IN-DEPTH

? (Optional) Step 4: Identify Additional Parameters to Determine Retirement Eligibility

INSTRUCTIONS: By default, all workforce planning tools and templates created by DHRM utilize at least 65 years of age with at least 5 years of service for determining retirement eligibility. Additional parameters are optional to be added by identifying additional age and years of service combinations or a minimum threshold for age and years of service combined by clicking the “add custom parameter” blue button. Up to 5 additional parameters can be added. If utilizing only the default retirement eligibility parameter, this step may be skipped.

Age: 65 Years of Service: 5

1. Click the “Add Custom Parameter” button again to add up to 5 parameters.

2. Enter the Minimum Age

3. Enter the Minimum Years of Service

4. Select either “And” / “Or” / “End”

5. Enter Sum of Age and YOS (not required if Step 4 is “End”)

Click to Remove Last Parameter Added

Age: Years of Service: -- -- Age+YOS:

(Optional) Step 4(a): Enter Parameters for Retirement Eligibility without Macros

If the blue buttons were used to enter the Retirement Parameters, this step can be skipped.

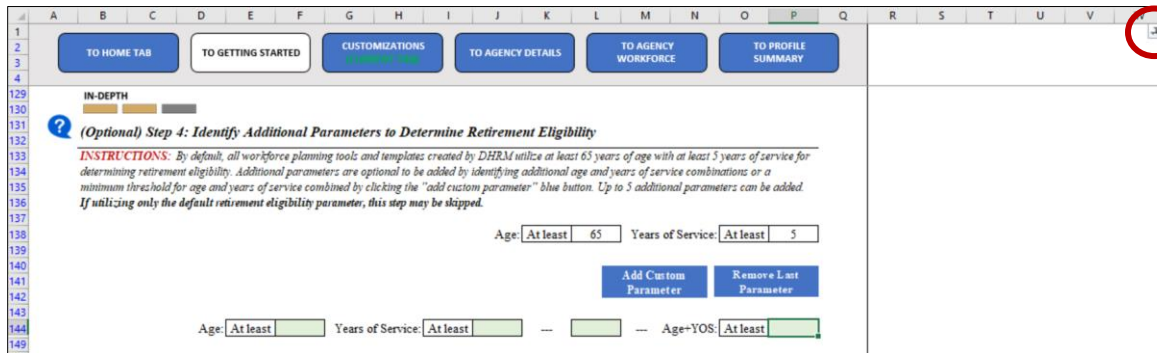
In the event Macros are not being used, the custom retirement parameters can be entered by first entering the total number of parameters in the green box.

(Optional) Step 4(a): Enter Additional Retirement Parameters if Not Using Macros

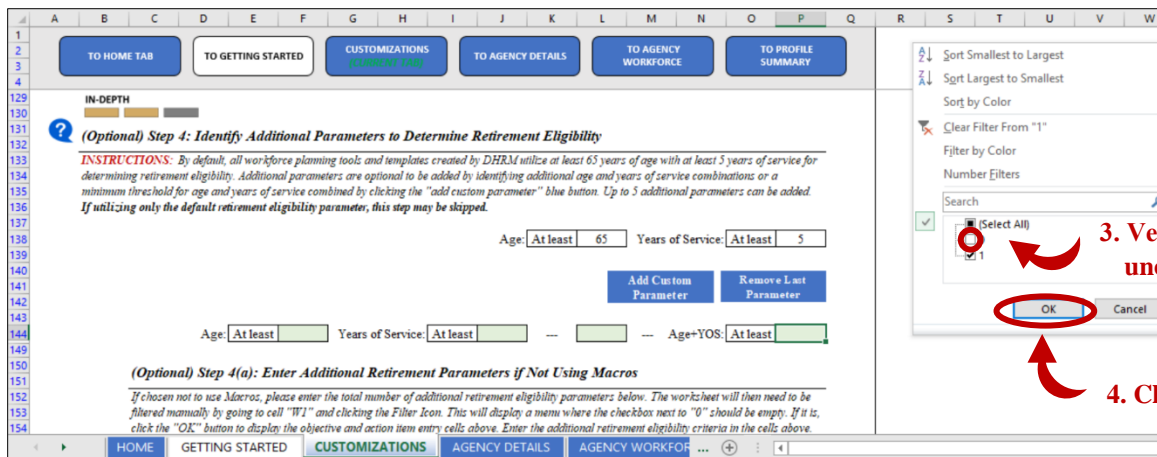
If chosen not to use Macros, please enter the total number of additional retirement eligibility parameters below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the additional retirement eligibility criteria in the cells above.

Total Custom Retirement Eligibility Parameters

1. Enter the Total Number of Custom Parameters



2. Click the filter Icon to show filter menu



3. Verify "0" is unchecked

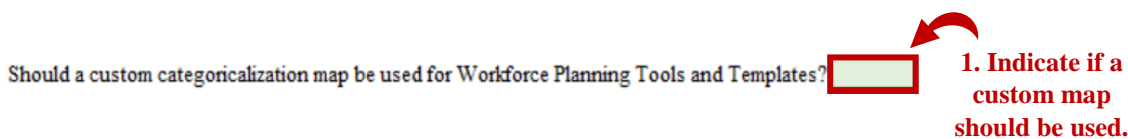
4. Click Ok

(Optional) Step 5: Provide Custom Transaction Categorization Map

By default, depending on the system used by the agency (PMIS or Cardinal), different transaction description reasons are grouped into four categories: internal transfers, internal promotions, external transfers, and voluntary separations. **If either of these default categorization maps match how the Agency classifies the transaction descriptions (or close to it), this step can be skipped.**

If the Agency utilizes their own HRIS system or if the default categorization map is significantly different in how the agency uses the transaction descriptions, a custom map can be provided. This map will affect calculations in other tools and templates by using the specified transaction descriptions for each category.

To enter a custom transaction map, if using PMIS or Cardinal, first identify that a custom map should be used by selecting “Yes” for the green box for “Should a custom categorization map be used for Workforce Planning Tools and Templates?” (shown in the picture below).



Next, for each of the four categories in the table below (internal transfers, internal promotions, external transfers, and voluntary separations), select the transaction code from the dropdown menu for a cell in any of the categories. Select the transaction code for the specific category, which will gray the cell in the transaction code column (shown in the picture below).

After selected, the code will be grayed out.

1. Select Transaction Code from the dropdown in any cell in the desired column.

Transaction Codes	Internal Transfers	Internal Promotions	External Transfers	Voluntary Separations
Classified Promotion		Classified Promotion		
Competitive Voluntary Transfer				
Death				
Demotion in Lieu of Layoff				
Disability Retirement				
Disciplinary Demotion				
Disciplinary Lateral Transfer				
Enhanced Retirement				
Field Change: Classified/Faculty				
Lateral Transfer in Lieu of Layoff				
Leave / Layoff / LTD				
LTD / Separation				
Military Leave without Pay				
Non-Competitive Vol. Transfer				
Performance Demotion				
Reassignment Within Band				
Resign (Various Categories)				
Retirement in Lieu of Layoff				
Service Retirement				
Short Term Disability				
Transfer Out				
Transfer to Local				
Voluntary Demotion				

Repeat this process until all transaction codes are placed within one of the four categories.

In the event the Agency uses its own transaction codes, the codes can be added to the Transaction Code Column by deleting the contents and adding them manually. This will overwrite the existing formula in the cells. After, the same procedures described above should be followed.

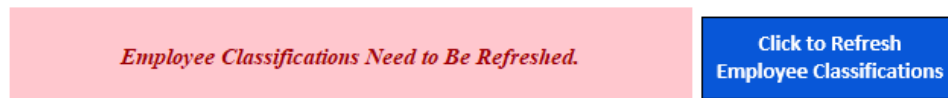
Agency Details Tab

The Agency Details tab identifies information about the agency, beginning with general information and then narrowing in focus. These include the agency name, secretariat, agency

number, positions, and structure. This tab also includes information of the agency strategic plans that are impacted by or pertain to the continuity of operations, recruitment, retention, engagement, and/or workforce development.

Before completing any steps on the Agency Details Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

Before



After

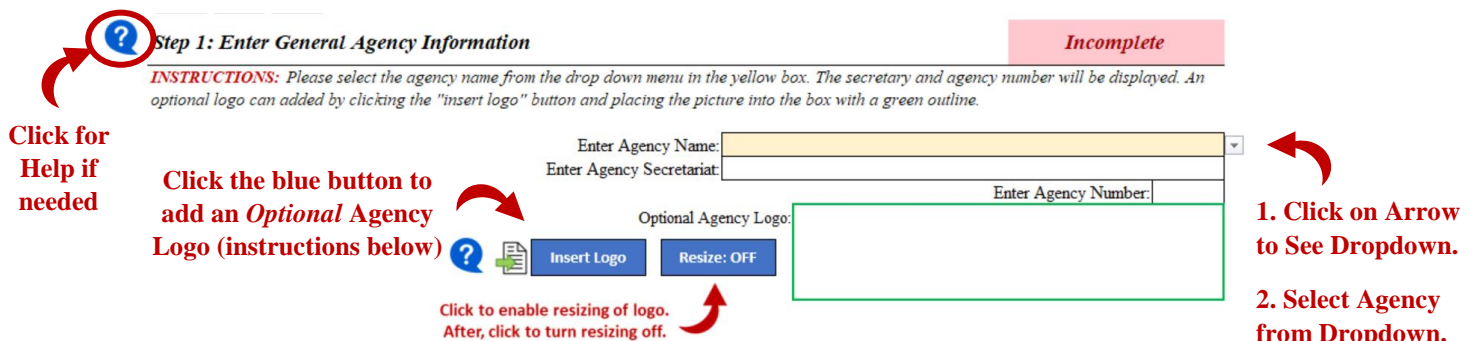


If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Agency Information

To complete step one, entering agency information, select the agency name from the drop down menu in the yellow box (shown in the picture below). To show the dropdown arrow, click in the yellow cell. The secretariat and agency number will be displayed automatically

An optional logo can be added by clicking the “Insert Logo” blue button, selecting the logo picture file, and then resizing the image to be within the green outlined box.



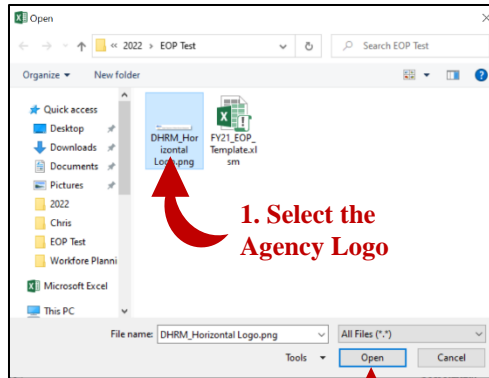
Click for Help if needed

Click the blue button to add an *Optional* Agency Logo (instructions below)

Click to enable resizing of logo. After, click to turn resizing off.

**1. Click on Arrow to See Dropdown.
2. Select Agency from Dropdown.**

To add an *optional* Agency Logo, click on the purple button to open the standard “Open File” dialog box. Simply locate and select the Agency Logo and click the “Open” button. **NOTE: The Agency Logo must be a picture file.**



Once added, resize the logo to be within the green outlined box (shown in the picture below) by clicking the "Resize: OFF" blue button. After the Image is resized to be within the green box click the "Resize: On" button.

Before

Click for Help if needed

Step 1: Enter General Agency Information Incomplete

INSTRUCTIONS: Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can added by clicking the "insert logo" button and placing the picture into the box with a green outline.

Enter Agency Name:

Enter Agency Secretariat:

Enter Agency Number:

Optional Agency Logo:

? Insert Logo Resize: ON

Click to enable resizing of logo. After, click to turn resizing off.

After

Step 1: Enter General Agency Information Incomplete

INSTRUCTIONS: Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can added by clicking the "insert logo" button and placing the picture into the box with a green outline.

Enter Agency Name:

Enter Agency Secretariat:

Enter Agency Number:

Optional Agency Logo:

? Insert Logo Resize: OFF

Click to enable resizing of logo. After, click to turn resizing off.

Step 2: Enter Agency Operational Information

Step 2 is comprised of three sub steps, two of which are optional. To complete step 2, only step 2(a), enter agency mission is required. Steps 2(b) and Step 2(c) are optional but if completed, will provide comprehensive level of analysis when analyzing data and using other workforce planning tools and templates.

Step 2(a): Enter Agency Mission

To complete Step 2(a), enter a brief, high level, description of the agency mission in the yellow box (shown in the picture below).

Step 2(a): Enter Agency Mission

Incomplete

INSTRUCTIONS: Enter a brief, high level, description of the agency mission in the yellow box below. Some items that may be included are what the agency does, who the agency serves, and/or how the agency meets the needs of those they serve.

Agency Mission

1. Enter a brief, high level, description of agency mission.

(Optional) Step 2(b): Identify Agency Lines of Service

To complete Step 2(b), enter the title and brief description of lines of service at the Agency by clicking the blue “Add Line of Service” button. A “Line of Service” is a modified approach to the traditional “line of business”. From the Agency mission entered previously, lines of service can be identified of “how” the agency achieves their mission. Up to 15 lines of service can be added to the Agency Profile. Though this step is optional, it can provide a comprehensive level of analysis when using workforce planning and development tools and templates.

If Not Using the Excel Macros, Skip to Step 2(b-i)

COMPREHENSIVE

(Optional) Step 2(b): Identify Agency Lines of Service

INSTRUCTIONS: A “line of service” is a modified approach to the traditional “line of business”. From the agency mission entered previously, lines of service can be identified by the specific “how’s” agencies achieve their mission. Please enter the different lines of service at the agency by clicking the “add line of service” and enter the line of service and a description. Up to 15 different lines of service can be added.

Click for Help if needed

1. Click the “Add Line of Service” button again to add up to 15 lines of service.

Add Line of Service

Remove Last Line of Service

Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

2. Enter Line of Service Title

3. Enter Line of Service Description

Lines of Service can be removed by clicking the blue “Remove Last Line of Service” button. This will remove the last line of service added.

COMPREHENSIVE



(Optional) Step 2(b): Identify Agency Lines of Service

INSTRUCTIONS: A "line of service" is a modified approach to the traditional "line of business". From the agency mission entered previously, lines of service can be identified by the specific "how's" agencies achieve their mission. Please enter the different lines of service at the agency by clicking the "add line of service" and enter the line of service and a description. Up to 15 different lines of service can be added.

Add Line of Service

Remove Last Line of Service

Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

Click to Remove Last Line of Service Added

(Optional) Step 2(b-i): Enter Lines of Service without Macros

If the blue buttons were used to enter the Lines of Service, this step can be skipped.

In the event Macros are not being used, the lines of service can be entered by first entering the total number in the green box.

(Optional) Step 2(b-i): Enter Lines of Service if Not Using Macros

If chosen not to use Macros, please enter the total number of lines of service below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the lines of service information in the cells above.

Total Number of Lines of Service

1. Enter the Total Number of Lines of Service

The screenshot shows the 'AGENCY DETAILS' worksheet. At the bottom, there is a green input field for 'Total Number of Lines of Service'. In the top right corner, a red circle highlights the 'Filter' icon in cell W1. The worksheet also displays the 'COMPREHENSIVE' header and the 'Optional Step 2(b): Identify Agency Lines of Service' section with its instructions and buttons.

2. Click the filter Icon to show filter menu

COMPREHENSIVE

(Optional) Step 2(b): Identify Agency Lines of Service

INSTRUCTIONS: A "line of service" is a modified approach to the traditional "line of business". From the agency mission entered previously, lines of service can be identified by the specific "how's" agencies achieve their mission. Please enter the different lines of service at the agency by clicking the "add line of service" and enter the line of service and a description. Up to 15 different lines of service can be added.

Buttons: Add Line of Service, Remove Last Line of Service

Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

(Optional) Step 2(b-i): Enter Lines of Service if Not Using Macros

If chosen not to use Macros, please enter the total number of lines of service below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above.

Total Number of Lines of Service:

Buttons: TO HOME TAB, TO GETTING STARTED, TO CUSTOMIZATIONS, AGENCY DETAILS (selected), TO AGENCY WORKFORCE, TO PROFILE SUMMARY

Filter Menu: (Select All), 0, 1, OK, Cancel

3. Verify "0" is unchecked

4. Click Ok

(Optional) Step 2(c): Identify Agency Physical Locations

To complete Step 2(c), enter the location name, county of location, lines of service at the location, and positions at the location (total, leader, executive) by clicking the blue "Add Location" button. The Agency can determine the best way to identify multiple locations, such as those staffed by the same group of employees or in close proximity to one another. Up to 25 locations can be added to the Agency Profile. Though this step is optional, it can provide a comprehensive level of analysis when using workforce planning and development tools and templates.

If Not Using the Excel Macros, Skip to Step 2(c-i)

COMPREHENSIVE

(Optional) Step 2(c): Identify Agency Physical Locations

INSTRUCTIONS: Please enter the different physical locations the agency operates by clicking the "add location". Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

1. Click the "Add Location" button again to add up to 25 locations.

Buttons: Add Location, Remove Last Location

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

2. Enter Location Name

3. Select County of Location

4. Add Lines of Service at Location

5. Enter Total Positions

6. Enter Total Leader Positions

7. Enter Total Executive Positions

Click for Help if needed

Locations can be removed by clicking the blue “Remove Last Location” button. This will remove the last location added.

COMPREHENSIVE

(Optional) Step 2(c): Identify Agency Physical Locations

INSTRUCTIONS: Please enter the different physical locations the agency operates by clicking the “add location”. Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

Add Location **Remove Last Location**

Click to Remove Last Location Added

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

(Optional) Step 2(c-i): Enter Locations without Macros

If the blue buttons were used to enter the Locations, this step can be skipped.

In the event Macros are not being used, the locations can be entered by first entering the total number in the green box.

(Optional) Step 2(c-i): Enter Agency Locations if Not Using Macros

If chosen not to use Macros, please enter the total number of agency locations below. The worksheet will then need to be filtered manually by going to cell “W1” and clicking the Filter Icon. This will display a menu where the checkbox next to “0” should be empty. If it is, click the “OK” button to display the objective and action item entry cells above. Enter the agency location information in the cells above.

Total Number of Agency Locations 1. Enter the Total Number of Locations

2. Click the filter Icon to show filter menu

TO HOME TAB TO GETTING STARTED TO CUSTOMIZATIONS AGENCY DETAILS (CURRENT TAB) TO AGENCY WORKFORCE TO PROFILE SUMMARY

COMPREHENSIVE

(Optional) Step 2(c): Identify Agency Physical Locations

INSTRUCTIONS: Please enter the different physical locations the agency operates by clicking the “add location”. Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

Add Location **Remove Last Location**

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

(Optional) Step 2(c-i): Enter Agency Locations if Not Using Macros

If chosen not to use Macros, please enter the total number of agency locations below. The worksheet will then need to be filtered manually by going to cell “W1” and clicking the Filter Icon. This will display a menu where the checkbox next to “0” should be empty. If it is, click the “OK” button to display the objective and action item entry cells above. Enter the agency location information in the cells above.

Total Number of Agency Locations

HOME GETTING STARTED CUSTOMIZATIONS AGENCY DETAILS AGENCY WORKFORCE

COMPREHENSIVE

(Optional) Step 2(c): Identify Agency Physical Locations

INSTRUCTIONS: Please enter the different physical locations the agency operates by clicking the "add location". Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

Add Location **Remove Last Location**

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

(Optional) Step 2(c-i): Enter Agency Locations if Not Using Macros

If chosen not to use Macros, please enter the total number of agency locations below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the agency location information in the cells above.

Total Number of Agency Locations:

HOME **GETTING STARTED** **CUSTOMIZATIONS** **AGENCY DETAILS** **AGENCY WORKFORCE** **TO PROFILE SUMMARY**

3. Verify "0" is unchecked

4. Click Ok

Step 3: Enter Agency Size & Structure Information

Step 3 is comprised of six sub steps, 4 are required and two are optional. To complete step 3, enter the total maximum employment level (MEL), Total Positions, Leader Positions, and Executive Positions by EEO Code and Employee Classifications. All FY21 information is optional to enter.

If data from SecurePass, Cardinal, the Blank Template and the RMS were imported, the data should automatically calculate the respective metrics. The agency should review the data for accuracy.

Step 3(a): Enter Maximum Employment Level (MEL)

To complete Step 3(a), enter to total MEL in the yellow box for FY22.

Step 3(a): Enter Maximum Employment Level (MEL)

Complete

INSTRUCTIONS: Enter the maximum employment level (MEL) for the agency in the yellow boxes below for each respective fiscal year. The maximum employment level is the authorized number of salaried full-time equivalent employees at the agency from the Appropriations Act.

Maximum Employment Level (MEL)

1. Enter the Agency MEL

Step 3(b): Enter Position Information

To complete Step 3(b), enter to total number of positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

DATA CONTINUITY NOTE: FY21 saw some confusion around positions by EEO code. To prevent any confusion, positions by EEO code should reflect total positions at the agency (filled and vacant, not unique positions). If using FY21 data, please be sure information reflects this updated definition.

	<u>All Positions by EEO Code</u>	
	FY21	FY22
Total Positions with EEO Code "Officials and Administrators"		
Total Positions with EEO Code "Professionals"		
Total Positions with EEO Code "Technicians"		
Total Positions with EEO Code "Protective Service Workers"		
Total Positions with EEO Code "Paraprofessionals"		
Total Positions with EEO Code "Administrative Support"		
Total Positions with EEO Code "Skilled Craft Workers"		
Total Positions with EEO Code "Service/Maintenance"		
Total Positions with EEO Code "Faculty"		
Total Positions with EEO Code "Other"		

1. Enter the total number of positions (filled and vacant) for each EEO Code.

	<u>All Positions by Classification</u>	
	FY21	FY22
Total Classified Positions		
Total Agency Head Positions		

2. Enter the total number of positions (filled and vacant) for each employee classification.

Step 3(c): Enter Leader Position Information

To complete Step 3(c), enter to total number of leader positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the FY22 column. Leader positions are defined as those who have at least one direct report. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

	<u>Leader Positions by EEO Code</u>	
	FY21	FY22
Total Leader Positions with EEO Code "Officials and Administrators"		
Total Leader Positions with EEO Code "Professionals"		
Total Leader Positions with EEO Code "Technicians"		
Total Leader Positions with EEO Code "Protective Service Workers"		
Total Leader Positions with EEO Code "Paraprofessionals"		
Total Leader Positions with EEO Code "Administrative Support"		
Total Leader Positions with EEO Code "Skilled Craft Workers"		
Total Leader Positions with EEO Code "Service/Maintenance"		
Total Leader Positions with EEO Code "Faculty"		
Total Leader Positions with EEO Code "Other"		

1. Enter the total number of leader positions (filled and vacant) for each EEO Code.

	<u>Leader Positions by Classification</u>	
	FY21	FY22
Total Leader Classified Positions		
Total Leader Agency Head Positions		

2. Enter the total number of leader positions (filled and vacant) for each employee classification.

Step 3(d): Enter Executive Position Information

To complete Step 3(c), enter to total number of executive positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the FY22 column. Executive positions are defined by the Agency on the Customization Tab. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

DATA CONTINUITY NOTE: FY21 used a blanket definition of the Executive Team (Agency Head and direct reports). With the ability for an agency to define the Executive

team, if using FY21 data, please be sure FY21 Executive positions reflect the new definition from the agency.

All Executive Positions by EEO Code

	FY21	FY22
Total Executive Positions with EEO Code "Officials and Administrators"		
Total Executive Positions with EEO Code "Professionals"		
Total Executive Positions with EEO Code "Technicians"		
Total Executive Positions with EEO Code "Protective Service Workers"		
Total Executive Positions with EEO Code "Paraprofessionals"		
Total Executive Positions with EEO Code "Administrative Support"		
Total Executive Positions with EEO Code "Skilled Craft Workers"		
Total Executive Positions with EEO Code "Service/Maintenance"		
Total Executive Positions with EEO Code "Faculty"		
Total Executive Positions with EEO Code "Other"		

1. Enter the total number of executive positions (filled and vacant) for each EEO Code.

All Executive Positions by Classification

	FY21	FY22
Total Executive Classified Positions		
Total Executive Agency Head Positions		

2. Enter the total number of executive positions (filled and vacant) for each employee classification.

Agencies that intend to use the Sub-Agency/Internal Department Review Tool or to add in-depth and comprehensive analyses to other supporting tools, the following optional steps should be completed.



WORKFORCE PLANNING AND DEVELOPMENT SUB AGENCY OR INTERNAL DEPARTMENT REVIEW

(TOOL NOT AVAILABLE FOR FISCAL YEAR 2022)

(Optional) Step 3(e): Identify Agency Internal Departments

To complete Step 3(e), enter the name of the internal department by clicking the “Add Department” blue button. Up to 50 departments can be added to the Agency Profile. Though this step is optional, it can provide an in-depth level of analysis when using workforce planning and development tools and templates and is required to use the Sub-Agency or Internal Department Review *(in development)*.

If Not Using the Excel Macros, Skip to Step 3(e-i)

IN-DEPTH

(Optional) Step 3(e): Identify Agency Internal Departments

INSTRUCTIONS: Enter the name of the internal departments at the agency that will be using the Sub Agency or Internal Department Review tool by clicking the “add department button” and enter the department name. Up to 50 departments can be added.

1. Click the “Add Department” button again to add up to 50 departments.

2. Enter Department Name

Department Name
Example Department

IN-DEPTH



(Optional) Step 3(e): Identify Agency Internal Departments

INSTRUCTIONS: Enter the name of the internal departments at the agency that will be using the Sub Agency or Internal Department Review tool by clicking the "add department button" and enter the department name. Up to 50 departments can be added.

Add Department	Remove Last Department
Department Name	
Example Department	

Click to Remove Last Department Added

(Optional) Step 3(e-i): Enter Internal Departments without Macros

If the blue buttons were used to enter the Internal Departments, this step can be skipped.

In the event Macros are not being used, the departments can be entered by first entering the total number in the green box.

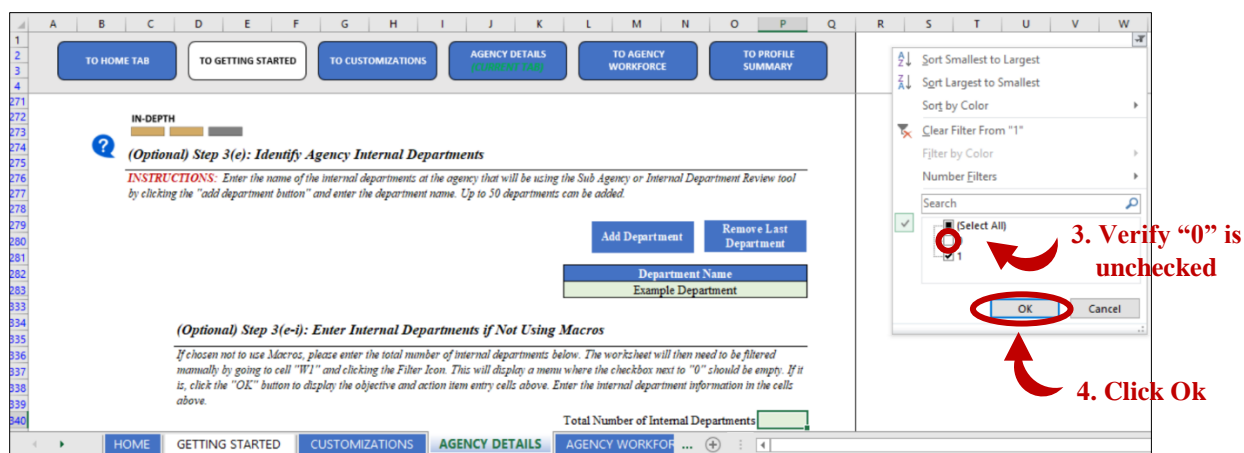
(Optional) Step 3(e-i): Enter Internal Departments if Not Using Macros

If chosen not to use Macros, please enter the total number of internal departments below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the internal department information in the cells above.

Total Number of Internal Departments

1. Enter the Total Number of Departments

2. Click the filter Icon to show filter menu



(Optional) Step 3(f): Identify Sub-Agencies or Divisions

To complete Step 3(f), enter the name of the sub-agencies or divisions by clicking the “Add Sub-Agency or Division” blue button. Up to 30 departments can be added to the Agency Profile. Though this step is optional, it can provide an in-depth level of analysis when using workforce planning and development tools and templates and is required to use the Sub-Agency or Internal Department Review (*in development*).

If Not Using the Excel Macros, Skip to Step 3(f-i)

IN-DEPTH

(Optional) Step 3(f): Identify Sub-Agencies or Divisions

INSTRUCTIONS: Enter the name of the sub-agencies that will be using the Sub Agency or Internal Department Review tool by clicking the “add Sub-Agency / Division” button and entering the information. Up to 30 Sub-Agencies or Divisions can be added.

1. Click the “Add Sub-Agency or Division” button again to add up to 30 divisions.

Add Sub-Agency or Division	Remove Last Sub-Agency or Division
Sub-Agency / Division Name	
Example Division Name	

2. Enter Sub-Agency or Division Name

IN-DEPTH

(Optional) Step 3(f): Identify Sub-Agencies or Divisions

INSTRUCTIONS: Enter the name of the sub-agencies that will be using the Sub Agency or Internal Department Review tool by clicking the “add Sub-Agency / Division” button and entering the information. Up to 30 Sub-Agencies or Divisions can be added.

Add Sub-Agency or Division	Remove Last Sub-Agency or Division
Sub-Agency / Division Name	
Example Division Name	

Click to Remove Last Sub-Agency or Division Added

(Optional) Step 3(f-i): Enter Sub-Agency or Divisions without Macros

If the blue buttons were used to enter the Sub-Agencies/Divisions, this step can be skipped.

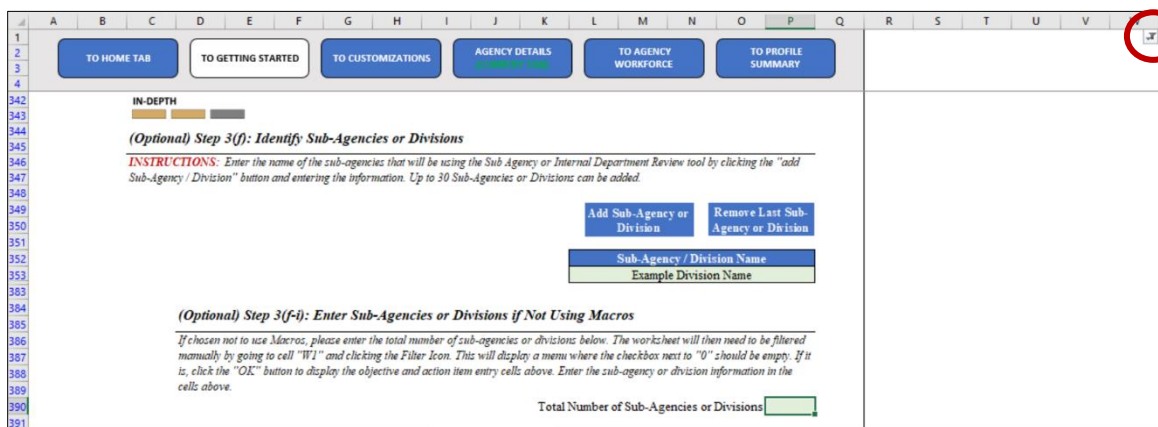
In the event Macros are not being used, the sub-agencies or divisions can be entered by first entering the total number in the green box.

(Optional) Step 3(f-i): Enter Sub-Agencies or Divisions if Not Using Macros

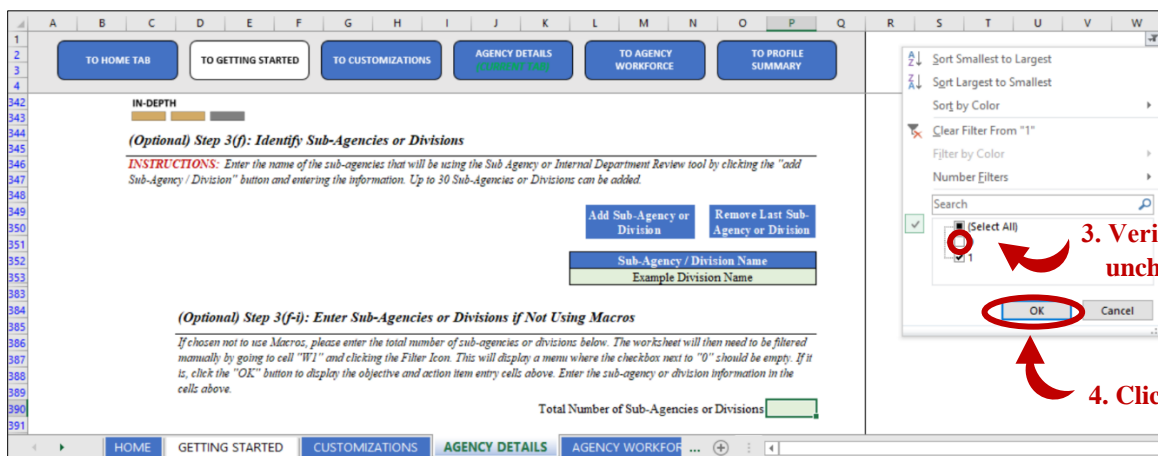
If chosen not to use Macros, please enter the total number of sub-agencies or divisions below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the sub-agency or division information in the cells above.

Total Number of Sub-Agencies or Divisions

1. Enter the Total Number of Sub-Agencies / Divisions



2. Click the filter Icon to show filter menu



3. Verify "0" is unchecked

4. Click Ok

Step 4: Enter Agency Strategic Plan Information

To complete step 4, identify any strategic actions or initiatives the agency is currently working towards that can be impacted by the continuity of operations or the recruitment, retention, engagement, or development of the agency workforce.

Potential sources of these actions could be the prior Workforce Planning and Development Template, Agency's Employment Opportunities Plan, One Virginia Plan, or any other strategic plan the agency may have.

NOTE: This is not the Agency's Workforce Planning Action Plan, but merely to ensure alignment with existing actions and initiatives from other strategic plans / areas of the Agency when developing actions later in the process.

Each item should include an overall objective statement and then specific actions items to take in order to fulfill that objective. A total of 15 objectives can be added per plan and a total of 5 action items can be added per objective.

If Not Using the Excel Macros, Skip to Step 4(a)

To add an objective, click the blue "Add Objective Button", this will show the objective description box.

The screenshot shows the 'Step 4: Enter Agency Strategic Plan Information' form. At the top left, there is a 'FOUNDATIONAL' progress bar with three segments. A red circle with a question mark and an arrow points to the 'Step 4' title, with the text 'Click for Help if needed' next to it. The form title 'Step 4: Enter Agency Strategic Plan Information' is followed by a red 'Incomplete' status box. Below the title, the 'INSTRUCTIONS' state: 'Please identify any strategic actions or initiatives the agency is currently working towards that can be impacted by the continuity of operations or the recruitment, retention, engagement, or development of the agency workforce. Potential sources of these actions items could be the prior Workforce Planning and Development Template, Agency's Employment Opportunities Plan, One Virginia Plan, or any other strategic plan the agency may have. The format of this section is to have an overall objective statement and specific action items. Objectives can be added by clicking the "Add Objective" button, for a total of 15 overall objectives.' Below the instructions, there are two buttons: 'Add Objective' (blue) and 'Remove Last Objective' (grey). A red circle highlights the 'Add Objective' button, with an arrow pointing to it and the text '1. Click the "Add Objective" to see Objective Entry Box (below)'. Below these buttons, the 'Objective' section is shown with a red 'Incomplete' status box. The instructions for this section are: 'Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.' Below the instructions, there is a label 'Overall Objective Statement' followed by a large yellow text box. A red circle highlights this yellow box, with an arrow pointing to it and the text '2. Enter the Objective Statement (brief) into the yellow box.' To the right of the yellow box are two buttons: 'Add Action Item' (blue) and 'Remove Last Item' (blue). A red circle highlights the 'Add Action Item' button, with an arrow pointing to it and the text '3. Click the "Add Action Item" button to see the Action Item Entry box'.

FOUNDATIONAL

Step 4: Enter Agency Strategic Plan Information Incomplete

INSTRUCTIONS: Please identify any strategic actions or initiatives the agency is currently working towards that can be impacted by the continuity of operations or the recruitment, retention, engagement, or development of the agency workforce. Potential sources of these actions items could be the prior Workforce Planning and Development Template, Agency's Employment Opportunities Plan, One Virginia Plan, or any other strategic plan the agency may have. The format of this section is to have an overall objective statement and specific action items. Objectives can be added by clicking the "Add Objective" button, for a total of 15 overall objectives.

.....

Add Objective **Remove Last Objective**

1. Click the "Add Objective" to see Objective Entry Box (below)

Objective Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

Add Action Item **Remove Last Item**

2. Enter the Objective Statement (brief) into the yellow box.

3. Click the "Add Action Item" button to see the Action Item Entry box

Objective

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

Add Action Item

Remove Last Item

Action Item

4. Enter the Action Item
in the Yellow Box

5. Click the "Add Action Item" button again to
add up to 4 more Action Items (Shown Below)

Action items can be removed by clicking the "Remove Last Item" purple button. This will remove the last action item that was added.

Objective

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

Add Action Item

Remove Last Item

Action Item

Click to
Remove Last
Added
Action Item

These steps should be repeated for any additional objectives (up to 15) added to the strategic action plan. In the event an objective should be removed, click the "Remove Objective" purple button. This will remove the objective and all action items.

Add Objective

Remove Last
Objective

(Optional) Step 4(a): Create an Agency Strategic Plan Information without Macros

If the blue buttons were used to enter the Strategic Plan Information, this step can be skipped.

In the event Macros are not being used, the agency strategic plan information can be entered by first entering the total number of objectives and total number of action items for each objective in the green boxes.

(Optional) Step 4(a): Enter Objectives & Action Items if Not Using Macros

If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.

Total Objectives	
Total Objective 1 Action Items	
Total Objective 2 Action Items	
Total Objective 3 Action Items	
Total Objective 4 Action Items	
Total Objective 5 Action Items	
Total Objective 6 Action Items	
Total Objective 7 Action Items	
Total Objective 8 Action Items	
Total Objective 9 Action Items	
Total Objective 10 Action Items	
Total Objective 11 Action Items	
Total Objective 12 Action Items	
Total Objective 13 Action Items	
Total Objective 14 Action Items	
Total Objective 15 Action Items	

1. Enter the Total Number of Objectives

(Optional) Step 4(a): Enter Objectives & Action Items if Not Using Macros

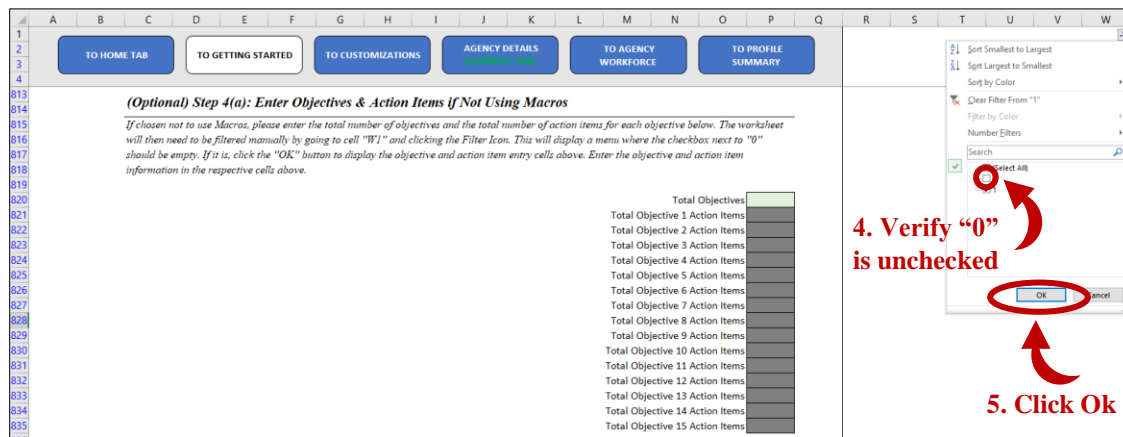
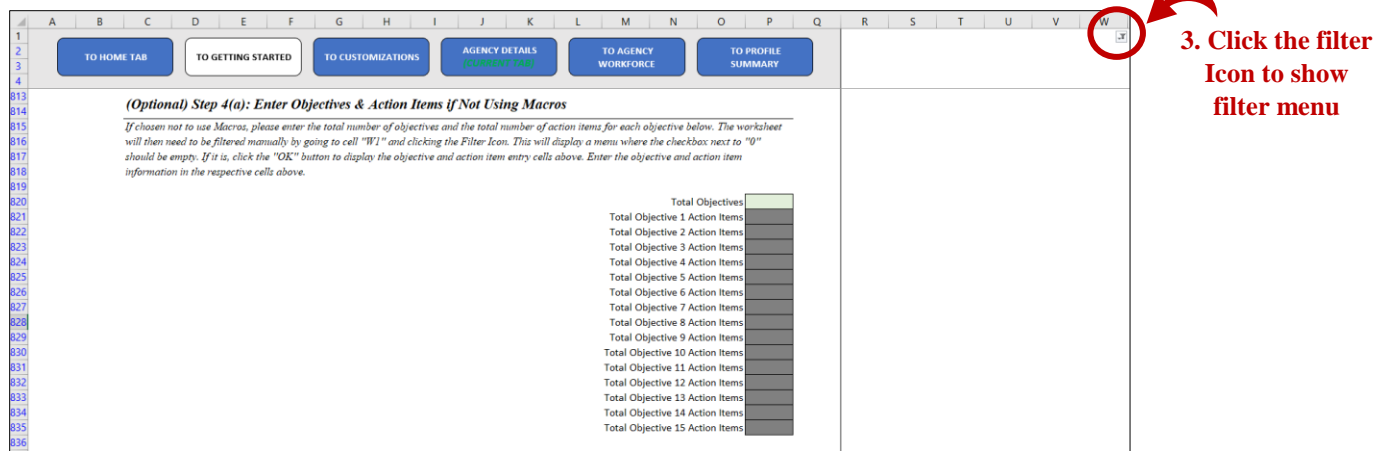
If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.

Total Objectives	5
Total Objective 1 Action Items	2
Total Objective 2 Action Items	3
Total Objective 3 Action Items	1
Total Objective 4 Action Items	5
Total Objective 5 Action Items	4
Total Objective 6 Action Items	
Total Objective 7 Action Items	
Total Objective 8 Action Items	
Total Objective 9 Action Items	
Total Objective 10 Action Items	
Total Objective 11 Action Items	
Total Objective 12 Action Items	
Total Objective 13 Action Items	
Total Objective 14 Action Items	
Total Objective 15 Action Items	

2. Enter the Total Number of Action Items for Each Objective

NOTE: If there is no objective, the box will be grayed out and can be left empty

After the numbers are entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.



Scroll up on the sheet to see the entry boxes for all objective and action items. The objective and action item numbers can be changed using this same process. If the objective number decreases, ensure all grayed out cells for the action items are empty, otherwise the data will not filter correctly.

(Optional) Step 5: Check Spelling

The template allows for the spell check feature to be used on this tab, however, Macros must be enable to use this feature. Click the "Spell Check This Tab" purple button, which will launch the Excel spell check function.

(Optional) Step 5: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue "Spell Check This Tab" button below. Correcting the spelling on this tab will ensure the report is correct as well.



Agency Workforce Tab

This tab identifies employee demographic information, broken down by race, gender, EEO code, classifications, employees with disabilities and veteran status for all employees, employees who are leaders, and executives. Employees with disabilities and veterans are further broken down by EEO code and classifications.

Before completing any steps on the Agency Workforce Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

Before



After



If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Employee Demographic Information

To complete Step 1, enter the total number of employees, broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

	Total Employees by Gender	
	FY21	FY22
Total Male Employees		
Total Female Employees		

	Total Employees by Race	
	FY21	FY22
Total American Indian or Alaskan Native Employees		
Total Asian Employees		
Total Black or African American Employees		
Total Hispanic or Latino Employees		
Total Native Hawaiian or Other Pac. Islander Employees		
Total White Employees		
Two or More Races		
Total Race Unknown or not Entered Employees		

1. Enter the total number employees for each gender.

2. Enter the total number employees for each race.

<i>Total Employees by EEO Code</i>		
	FY21	FY22
Total EEO Code Officials and Administrators		
Total EEO Code Professionals		
Total EEO Code Technicians		
Total EEO Code Protective Service Workers		
Total EEO Code Paraprofessionals		
Total EEO Code Administrative Support		
Total EEO Code Skilled Craft Workers		
Total EEO Code Service/Maintenance		
Total EEO Code Faculty		
Total EEO Code Other		

3. Enter the total number employees for each EEO Code.

<i>Total Employees by Classification</i>		
	FY21	FY22
Total Classified Employees		
Total Agency Head Employees		

4. Enter the total number employees for each employee classification.

<i>Additional Employee Demographics</i>		
	FY21	FY22
Total Employees with Disabilities		
Total Veterans		

5. Enter the total number employees with disabilities and veterans.

Step 2: Enter Leader Demographic Information

To complete Step 2, enter to total number of leaders (defined as individuals with at least one direct report), broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<i>Total Leaders by Gender</i>		
	FY21	FY22
Total Male Leaders		
Total Female Leaders		

1. Enter the total number leaders for each gender.

<i>Total Leaders by Race</i>		
	FY21	FY22
Total American Indian or Alaskan Native Leaders		
Total Asian Leaders		
Total Black or African American Leaders		
Total Hispanic or Latino Leaders		
Total Native Hawaiian or Other Pac. Islander Leaders		
Total White Leaders		
Two or More Races		
Total Race Unknown or not Entered Leaders		

2. Enter the total number leaders for each race.

<i>Total Leaders by EEO Code</i>		
	FY21	FY22
Total Leader EEO Code Officials and Administrators		
Total Leader EEO Code Professionals		
Total Leader EEO Code Technicians		
Total Leader EEO Code Protective Service Workers		
Total Leader EEO Code Paraprofessionals		
Total Leader EEO Code Administrative Support		
Total Leader EEO Code Skilled Craft Workers		
Total Leader EEO Code Service/Maintenance		
Total Leader EEO Code Faculty		
Total Leader EEO Code Other		

3. Enter the total number leaders for each EEO Code.

<u>Total Leaders by Classification</u>		
	FY21	FY22
Total Classified Leaders		
Total Agency Head Leaders		

4. Enter the total number leaders for each employee classification.

<u>Additional Leader Demographics</u>		
	FY21	FY22
Total Leaders with Disabilities		
Total Veterans Leaders		

5. Enter the total number leaders with disabilities and veterans.

Step 3: Enter Executive Demographic Information

To complete Step 3, enter to total number of executives (defined by the agency), broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Executives by Gender</u>		
	FY21	FY22
Total Male Executives		
Total Female Executives		

1. Enter the total number of executives for each gender.

<u>Total Executives by Race</u>		
	FY21	FY22
Total American Indian or Alaskan Native Executives		
Total Asian Executives		
Total Black or African American Executives		
Total Hispanic or Latino Executives		
Total Native Hawaiian or Other Pac. Islander Executives		
Total White Executives		
Two or More Races		
Total Race Unknown or not Entered Executives		

2. Enter the total number of executives for each race.

<u>Total Executives by EEO Code</u>		
	FY21	FY22
Total Executive EEO Code Officials and Administrators		
Total Executive EEO Code Professionals		
Total Executive EEO Code Technicians		
Total Executive EEO Code Protective Service Workers		
Total Executive EEO Code Paraprofessionals		
Total Executive EEO Code Administrative Support		
Total Executive EEO Code Skilled Craft Workers		
Total Executive EEO Code Service/Maintenance		
Total Executive EEO Code Faculty		
Total Executive EEO Code Other		

3. Enter the total number of executives for each EEO Code.

<u>Total Executives by Classification</u>		
	FY21	FY22
Total Classified Executives		
Total Agency Head Executives		

4. Enter the total number of executives for each employee classification.

<u>Additional Executive Demographics</u>		
	FY21	FY22
Total Executives with Disabilities		
Total Veterans		

5. Enter the total number of executives with disabilities and veterans.

Step 4: Enter Demographic Information for Employees with Disabilities

To complete Step 4, enter to total number of employees with disabilities for each EEO Code and Employee Classification by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Employees with Disabilities by EEO Code</u>		
	FY21	FY22
Total Employees with Disabilities EEO Code Officials and Administrators		
Total Employees with Disabilities EEO Code Professionals		
Total Employees with Disabilities EEO Code Technicians		
Total Employees with Disabilities EEO Code Protective Service Workers		
Total Employees with Disabilities EEO Code Paraprofessionals		
Total Employees with Disabilities EEO Code Administrative Support		
Total Employees with Disabilities EEO Code Skilled Craft Workers		
Total Employees with Disabilities EEO Code Service/Maintenance		
Total Employees with Disabilities EEO Code Faculty		
Total Employees with Disabilities EEO Code Other		

1. Enter the total number of employees with disabilities for each EEO Code.

<u>Total Employees with Disabilities by Classification</u>		
	FY21	FY22
Total Classified Employees with Disabilities		
Total Agency Head Employees with Disabilities		

2. Enter the total number of employees with disabilities for each employee classification.

Step 5: Enter Demographic Information for Veterans

To complete Step 4, enter to total number of veterans for each EEO Code and Employee Classification by entering the total number for each in the yellow box under the FY22 column. All FY21 information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Veterans by EEO Code</u>		
	FY21	FY22
Total Veteran EEO Code Officials and Administrators		
Total Veteran EEO Code Professionals		
Total Veteran EEO Code Technicians		
Total Veteran EEO Code Protective Service Workers		
Total Veteran EEO Code Paraprofessionals		
Total Veteran EEO Code Administrative Support		
Total Veteran EEO Code Skilled Craft Workers		
Total Veteran EEO Code Service/Maintenance		
Total Veteran EEO Code Faculty		
Total Veteran EEO Code Other		

1. Enter the total number of veterans for each EEO Code.

<u>Total Veterans by Classification</u>		
	FY21	FY22
Total Classified Veterans		
Total Agency Head Veterans		

2. Enter the total number of veterans for each employee classification.

Profile Summary Tab

The Profile Summary is an optional tab that can be used to explore information in the agency profile by fiscal year and demographic (employee, leader, executive). It provides an overview of the agency operations and the agency workforce. The workforce insights section (noted with the blue background) can be exported as a PDF to be a standalone summary if desired.

Before completing any steps on the Agency Details Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

Before



After

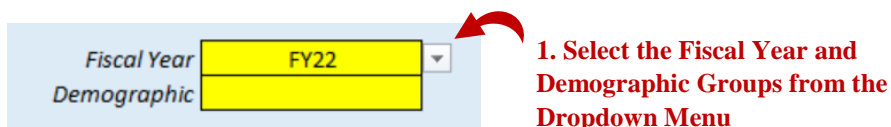


If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

(Optional) Step 1: Review the Workforce Insights of the Agency Profile

The Workforce Insights section provides a breakdown of agency positions and workforce demographics. The information can be filtered based on fiscal year and demographic (non-leader, leader, executive, or all employees) by using the dropdown menu in the boxes highlighted yellow.

After selecting the yellow box, click the drop down arrow on the right to see the dropdown menu and select the desired filter.



(Optional) Step 2: Export the Summary to PDF

By default, the date of the summary is the current date. However, if the summary should reflect a different date, a new date can be entered in the green box (shown below).

(Optional) Step 2: Export the Workforce Insights to PDF

INSTRUCTIONS: Click the blue button below to Export the Workforce Insights section to a PDF. The report will be exported to reflect today's date by default, but the date that appears on the report may be adjusted using the date box below.

Enter Date to be reflected on Summary (if different from Today): MM/DD/YY

1. Enter new date if needed.

Export Workforce Insights to PDF

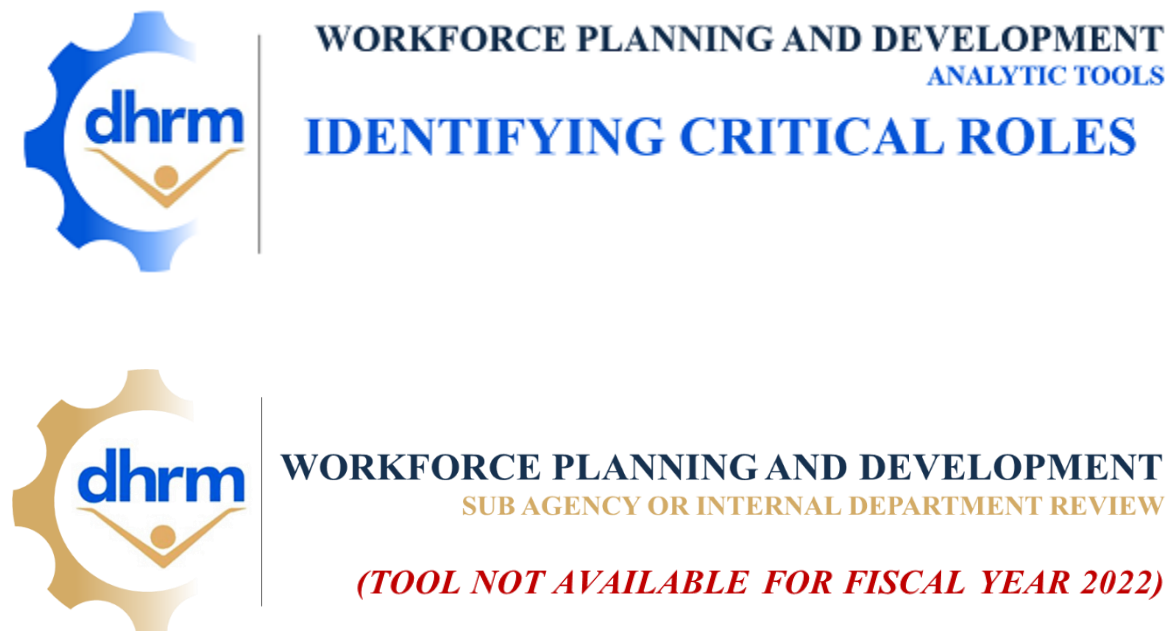
The summary can be exported as a PDF by clicking the “Export Workforce Insights to PDF” blue button. This will open a dialog box to save the PDF using the standard process to save a file. The report can be viewed by going to the saved location and opening the file.

(Optional) Step 2: Printing the Summary to PDF (without Macros)

If not using the Macros, the report can be printed as a PDF using the standard Excel print function. Go to the “File” menu, and select print. Ensure the printer is “Microsoft Print to PDF” and click “Print”. Choose the save location and click “Save”. The report can be viewed by going to the saved location and opening the file.

4.0 Next Steps

The Agency Profile can be imported directly into other Workforce Planning Tools and Templates (examples below). This will automatically populate certain information into those tools, based on the purpose and design of each tool.



For Questions or Additional Assistance

For questions or assistance with the template, please contact DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov.

5.0 Appendix

SecurePass/HuRman Report Information

Agencies not using the Cardinal HCM system are able to generate their workforce report using the SecurePass/HuRman portal. After logging into HuRMan, select Agency Repository from the drop down menu. Select the Agency Profile is in the Agency Repository, typically around the July 15th timeframe.

Cardinal Report Information

Agencies still have access to historical data using the HuRman e480 report tool. The Cardinal reports are set up differently and may be a little more cumbersome, especially since we are just learning how to use them. However, agencies have direct access to their own data. You may want to review the Catalog of reports listed under the Resources tab on the Cardinal Webpage to determine which ones best meet your needs. In addition to the Job Data reports, you may want to review:

- Employee Disability and Veterans Status
- Employee Turnover
- Job Group Diversity
- Separations

The Cardinal team has an HCM Reports Job Aid tool and a Learning webinar to assist with running the reports.